SOFTWARE TRAINING ROLLOUT SUCCESS TOOLKIT

Introduction

Rolling out a new software system? This guide equips L&D, Enablement, and Customer Education leaders with practical, tested steps to ensure training success without being caught off-guard by last-minute IT chaos, disengaged learners, or content misfires.

What You'll Get:

- Clear rollout phases
- Key stakeholders to align with
- Templates to adapt for internal or customer-facing rollouts
- Tactical checklist for each stage
- Callouts to avoid common pitfalls

How to Use This Guide

Use this playbook as your training rollout control tower—build trust, align stakeholders, and deliver impact, without scrambling last minute.

- Start Early: Share this guide during kickoff meetings with IT, project managers, and exec sponsors. Use it to define scope and expectations.
- Customize Per Project: Not every rollout will need all 6P phases—highlight and use only the ones that apply to your scale and org structure.
- Print or Share Digitally: Use the fillable table templates for pilot selection, hype video scripting, and checklists in team meetings or project tracking docs.
- Train the Trainers & Help Desk: Use sections 4–6 to onboard those responsible for knowledge sharing—especially customer-facing or support roles.
- Embed into Feedback Loops: After go-live, revisit this playbook to reflect on what worked, gather team feedback, and continuously improve your process.
- Use it as an ROI Tool: Pull metrics and impact examples from each phase to include in your year-end L&D report.

Core Framework: The 6P Rollout Model

Phase	Name	Purpose
1.	Pilot Setup	Build trust and test content early with a diverse group
2.	Project Alignment	Clarify roles, responsibilities, and timeline buffers
3.	Platform Stability Check	Lock in UI/UX before training build starts
4.	Pre-Training Hype	Build awareness & engagement before LMS notification hits
5.	Production and Distribution	Create modular, updateable tutorials using iorad
6.	Post-Launch Support	Enable help desk, feedback loops, and ROI storytelling

Phase 1: Pilot Setup

Goal: Pressure-test both training and software with a mix of champions and skeptics.
What to Do:

- Select pilot users:
  - Champions
  - Change-averse folks
  - Vocal critics
- Set up a feedback form (MS Forms or Google Forms works fine)
- Run a feedback session—record learnings
- Include Help Desk in pilot (crucial!)

Template: Pilot Tracker

Name	Location	Role	Feedback	Status

Phase 2: Project Alignment

Goal: Get clarity early on roles, dependencies, and success definitions.
Checklist:

- Hold a kickoff with L&D, IT, Exec Sponsor, PMs
- Define:
  - Go / No-Go date for content creation
  - Stretch vs Actual Launch Dates
  - Content Owner(s)
  - Comms Owner(s)
- Identify supporting teams:
  - HR
  - Safety
  - Operations
  - Marketing (if external rollout)

Phase 3: Platform Stability Check

Goal: Don't start training dev until the software UI is stable.

Red Flags to Watch:

- Button placements shifting
- New modules being added last-minute
- Homepage design still changing

What to Say to IT:
"Can we agree on the exact date you expect stable screens? We'll start iorad recordings after that."

Phase 4: Pre-Training Hype

Goal: Learners need to want the training before they receive it.

Actions:

- Draft an internal announcement → ghostwrite for Exec Sponsor
- Create a 60-second "Hype Video"
- Work with Marketing to embed content in CRM/email drip (like Pardot)
- Run pre-launch info session for regional managers and HR

Template: Hype Video Outline:

Section	Content
Hook	"Here's why this new tool will make your job easier…"
Visuals	UI preview, testimonials
CTA	"Training drops next week – stay tuned!"

Phase 5: Production & Distribution (iorad FTW)

Goal: Create reusable, modular content that's version-controlled.

Tactical Tips:

- Record short tutorials (5 min max)
- Title them task-first:
  ❌ "Homepage Overview"
  ✅ "How to Delete an Item"
- Embed iorad tutorials in:
  - LMS
  - CRM
  - Custom help pages (Sara used app question-mark icon!)

Distribution Channels:

- Internal: LMS, intranet, MS Teams, Slack
- External: Pardot pages, customer email
- Shared: Publicly accessible cloud links

Phase 6: Post-Launch Support

Goal: Ensure adoption doesn't die after Day 1.

Do This:

- Set up "Hypercare" Teams/Slack channel
- Enable Help Desk:
  - Train them before rollout
  - Give access to all training content
- Set up feedback capture:
  - Weekly check-ins
  - Forums or forms
- Build your Annual Impact Story:
  - Time saved per SME
  - % of tutorials reused
  - Speed of go-to-market
  - Learner quotes

Final Checklist

Area	Task	Done?
Pilot Group	Diverse users & Help Desk included	☐
Project Plan	Go/No-Go Date set	☐
UI Freeze	IT confirmed stable system	☐
Hype Video	Drafted + embedded	☐
Tutorials	Recorded, task-titled, cloud-shared	☐
Help Desk	Trained, included in rollout	☐
Feedback	Live forms & comms loops	☐
ROI Tracking	Before/after SME time saved	☐